Dynamics365/MSCRM Online & GP - Bidirectional Integration

Overview

DBSync for Dynamics365/MSCRM Online & Microsoft Dynamics GP Integration is easy to use an application. It integrates MSCRM Online Accounts/Contacts, Products and Invoice with GP Customers, Items and SOP Transactions respectively. DBSync is also useful in migrating historical GP data into Dynamics365/MSCRM Online or vice versa. DBSync provides Bi-directional sync with pre-built field-to-field mapping along with flexibility for more complex and dynamic mapping capability.

Data Flow

Data Flow of Bi-directional integration between MSCRM Online & Microsoft Dynamics GP is shown in the table below.

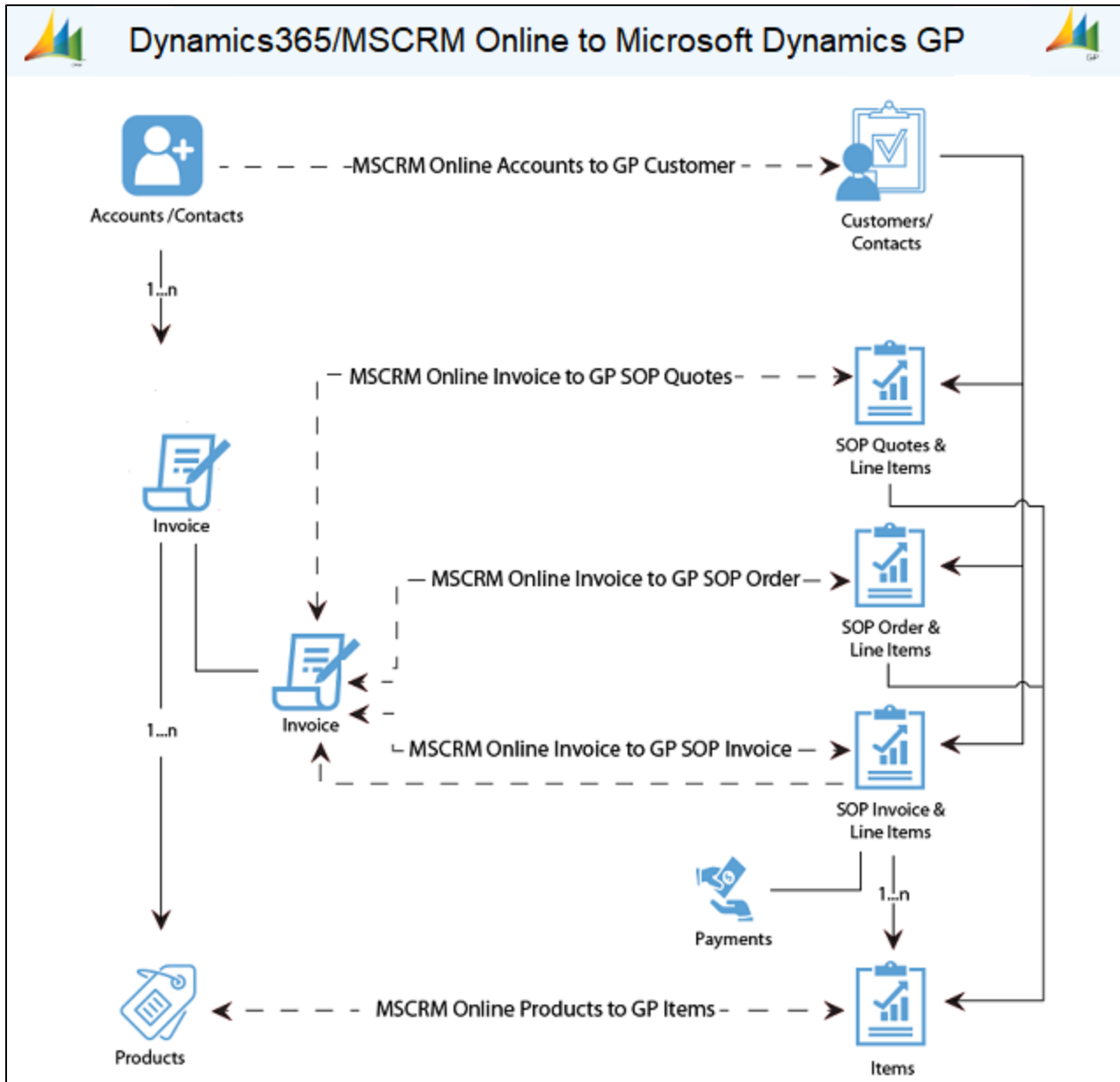| Dynamics365/MSCRM Online		Microsoft Dynamics G
Accounts/Contacts	⬌	Customer/Contact
Invoice/Line Items	⬌	SOP Quote
Invoice/Line Items	⬌	SOP Order
Invoice/Line Items	⬌	SOP Invoice
Products	⬌	Items

Process Map

Process Map of Bi-directional integration between Dynamics365/MSCRM Online & Microsoft Dynamics GP is shown in the image below.

Dynamics365/MSCRM Online to Microsoft Dynamics GP

Pre-requisites for Integration

In order to ensure that DBSync is appropriately configured to integrate data between Dynamics365/MSCRM Online and Microsoft Dynamics GP instance, please make sure you have the following in place:

- Microsoft.net Framework 4.0 and above.

- eConnect Service Pre-Installed with your GP software.

- Setup and Configuration of eConnect Runtime Service for the Domain and User accessing GP database.

Creation of Custom fields in MSCRM

1. Follow the steps to include DBSync fields into Form Editor.
2. For the Account entity, two fields need to be created.
   - Go to **Settings > Customize > Entities> Account > Create field > GP Id (Text field).**
   - Go to **Settings > Customize > Entities> Account > Create field >Sync To Gp(Multiple Options) Picklist names-Sync,Synced,Not Synced.**
3. For the Product entity, two fields need to be created.
   - Go to **Settings > Customize > Entities> Product > Create field > GP Id (Text field).**
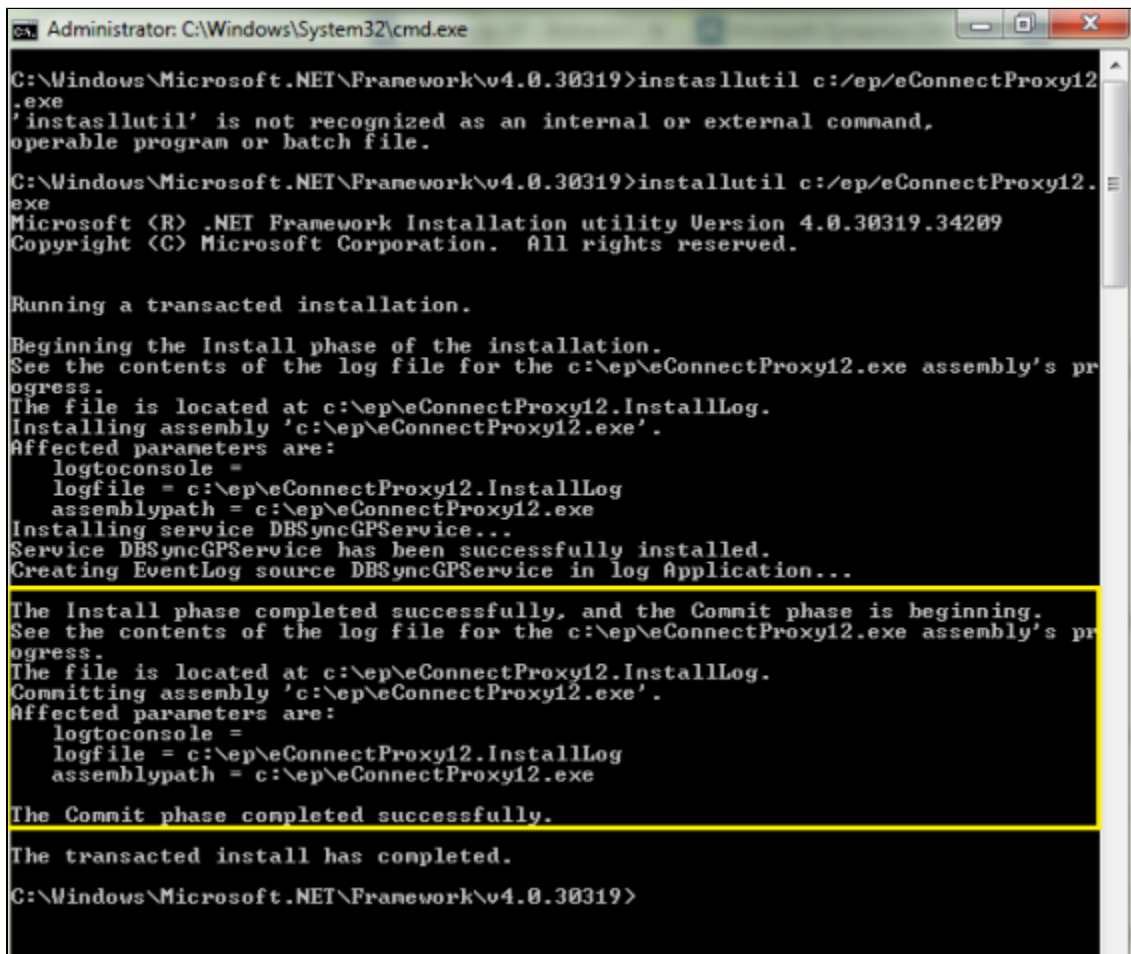   - Go to **Settings > Customize > Entities> Product > Create field >Sync To Gp(Multiple Options) Picklist**

names-Sync,Synced,Not Synced.
4. For the Invoice Header fields entity, three fields need to be created.
    - Go to **Settings > Customize > Entities> Invoice > Create field > GP Id (Text field).**
    - Go to **Settings > Customize > Entities> Invoice > Create field >Sync To Gp(Multiple Options) Picklist names-Sync,Synced,Not Synced.**
    - Go to **Settings > Customize > Entities> Invoice > Create field > DBSync Error (Text field).**
5. For the Invoice Line Item fields entity, one field needs to be created.
    - Go to **Settings > Customize > Entities> Invoice Line > Create field >DBSync GP Id (Text field).**
6. At this point, you have successfully completed the configuration of your Dynamics365/MSCRM Online instance for integration with Microsoft Dynamics GP.

Install & Configure eConnect Proxy Service

1. In order to establish a connection between the DBSync application and Microsoft Dynamics GP, you will need to download the eConnect Proxy Service. Download location - http://www.mydbsync.com/dbsync2download/currentrelease/gp2015/eConnectProxy14.zip
2. Once the file is downloaded, extract the contents of the file to any desired download location.
    > **Note:** The extract of the file contains four versions of eConnect Proxy service: (1) **eConnectProxy_2010.exe** for GP10 or GP 2010; (2) **eConnectProxy.exe** for GP11; (3) **eConnectProxy12.exe** for GP12 & GP13; and (4), **eConnectProxy 14.exe** for GP14 & GP15.

3. Once the right version of the eConnectProxy file is extracted, install the eConnectProxy Service using windows **installutil** utility.
4. If the eConenctProxy is extracted to location **"c:\ep\eConnectProxy12.exe"** then, navigate to Microsoft.net framework location and run the following command from the elevated command prompt window on your windows or windows server operating system - C:\Windows\Microsoft.NET\Framework\v4.0.30319> installutil c:\ep\eConnectProxy12.exe.
5. Once you run the command, you will see a message in the command prompt as shown below - acknowledging that the service is installed successfully.

1. If for some reason, the service is not successfully installed then, you can verify the error log details in the file **eConnectProxy12.InstallL og** or, in the **eConnectProxy.InstallLog** files.

> The Following are some of the known issues working with **installutil** utility for any file downloaded from the internet and resolution steps to avoid/prevent them.

2. If you are getting an error with regards to file permissions, right-click on the eConenctProxy.exe file and click on **UnBlock** as shown below.
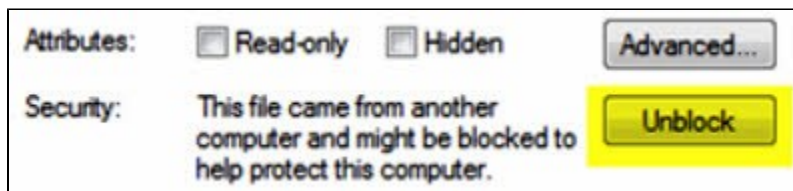
DBSync Profile Setup Installation

- Go to www.mydbsync.com and register for a Free Trial. Ensure that Source & Target Adapters are Dynamics365/MSCRM Online & Microsoft Dynamics GP respectively.
- It is necessary that the On-Premise version of DBSync is used for Dynamics365/MSCRM Online and Microsoft Dynamics GP Integration. In order to use DBSync On-Premise, DBSync should be installed locally and DBSync Account should be switched to On-Premise from On Demand.
- To learn more about the process of installing DBSync, link: http://help2.mydbsync.com/docs1/display/dbsync/DBSync+On-Premise+Installation
- To learn more about the process of switching DBSync Account from On Demand to On-Premise, link: http://help2.mydbsync.com/docs1/display/dbsync/DBSync+On+Demand+to+On+Premise

DBSync Configuration for Microsoft Dynamics GP

1. Login to www.mydbsync.com with your **Username & Password**.
2. Once logged in, click on **My Home** from the Menu and click **Launch**.
3. Once launched, you will be redirected to the DBSync Project page in the next tab.
4. Click on the Connectors menu.
5. Click on Dynamic GreatPlains Connectors
6. Click on GreatPlains Connector and enter the details as mentioned below:
   a. **For GreatPlains**
      i. *eConnectPort : 18888.*
      ii. *Data source: DESKTOPUSERNAME\MSSQLSERVER.*
      iii. *Database name : <<GreatPlains Company Database name >>.*
7. Click **Save** and **Validate Connection** to save and validate your GreatPlains adapter.
8. Enter your **Microsoft Dynamics GP *global administrator Username*** and **Password.**
9. In the above example, your server_name should be prefixed in place of the default value.
10. Scroll down to the bottom of the section and click **Validate Connection** to validate your Microsoft Dynamics GP credentials and **Save.**
11. If you are using it for the first time, click on the **Activate option for** screen appear. Enter your global **Administrator Username,** and accept the terms and conditions. Now users can connect to the Microsoft Dynamics GP account.

DBSync Configuration for Dynamics365/MSCRM Online

1. Login to www.mydbsync.com with your **Username & Password**.
2. Once logged in, click on **My Home** from the Menu and click **on Development Studio.**
3. Once launched, you will be redirected to the **DBSync Project page** in the next tab.
4. Click on the **Connectors** menu.
5. Click on **Dynamic365/MSCRM Online** Connectors.
6. Enter your **Dynamics365/MSCRM Online *global administrator Username*** and **Password.**
7. Make sure you modify the **"Dynamics365/MSCRM Soap URL"** according to the domain name provided to you by Microsoft at the time of registration for Microsoft Dynamics CRM Online application. A simple example is - Microsoft CRM Soap URL : **https:// (https://**)<<server_name>/.**
8. Scroll down to the bottom of the section and click **Validate Connection** to validate your Dynamics365/MSCRM Online credentials and Save.
9. If you are using it for the first time, click on the **Activate option for** screen appear. Enter your global *Administrator* Username, and accept the terms and conditions. Now user can connect to the Dynamic365/MSCRM Online account.

Running the integration

DBSync integration for Dynamics365/MSCRM Online & Microsoft Dynamics GP can be run automatically - using **Scheduler** - or, it can be run manually by using the **Run** Button.
Click on the following link to learn how to use Scheduler to run the integration.
http://help2.mydbsync.com/docs1/display/dbsync/Scheduler

To run the integration manually, using the Run button, follow the steps:

1. Login to www.mydbsync.com with your **Username & Password**.
2. Once logged in, click on **My Home** from the Menu and click **Launch**.
3. Once launched, you will be redirected to the DBSync Project page in the next tab.
4. Click on the project Dynamics365/MSCRM Online GreatPlains: BiDirectional and then click on Connectors on the left panel.
5. Upon successful validation of your connectors, you can click on Processes on the side panel. Then, click the **Run Now** button.